Handout for the SupplyOn User & Company Administrator

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1 About this Manual

This manual provides information on the user and company administration for new suppliers.

Your customer uses SupplyOn to electronically exchange P2P-related documents. You have been given the roles of user and company administrator for your company.

In principle, we would advise to create at least one more company administrator within your company and share this document with him/her, as this gives your company more flexibility in maintaining your users and will prevent problems in case you take up other responsibilities in the future.

1.1 Abbreviations

Abbreviation	Meaning
ASN	Advance Shipping Notice
CG	Corporate Group
CP	Control Point
LE	Legal Entity
P2P	Purchase-to-Pay
SSO	Single Sign On

2 How to access SupplyOn

To work with SupplyOn, you need a User ID and password. This has been created for you already and communicated by the SupplyOn support team to you. To create further accounts, log in to SupplyOn:

1. Open an internet-browser and log in to SupplyOn.

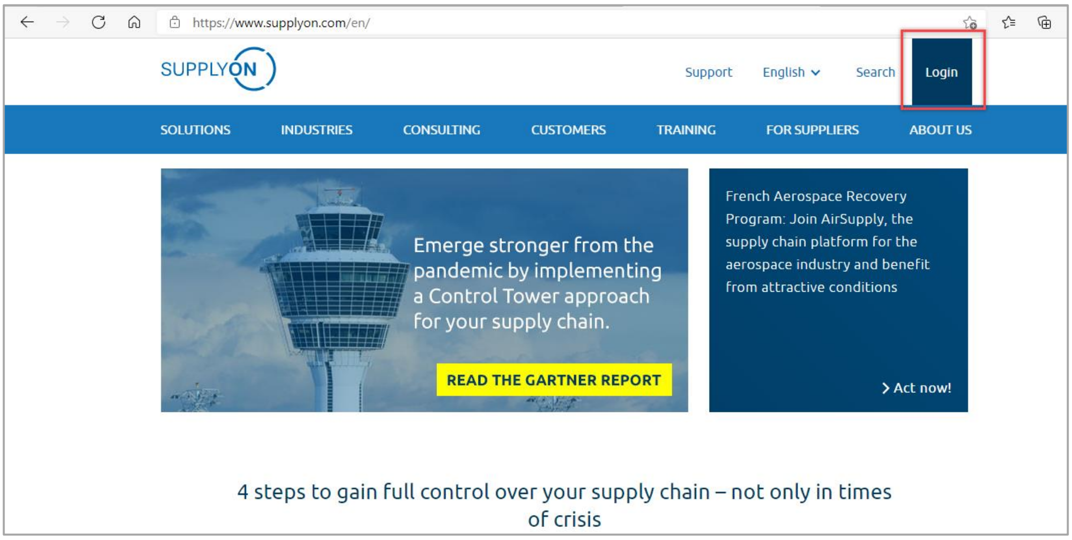

Figure: **SupplyOn home page with Login button**

Depending on your originally assigned roles, you may see the Dashboard screen with different tiles.

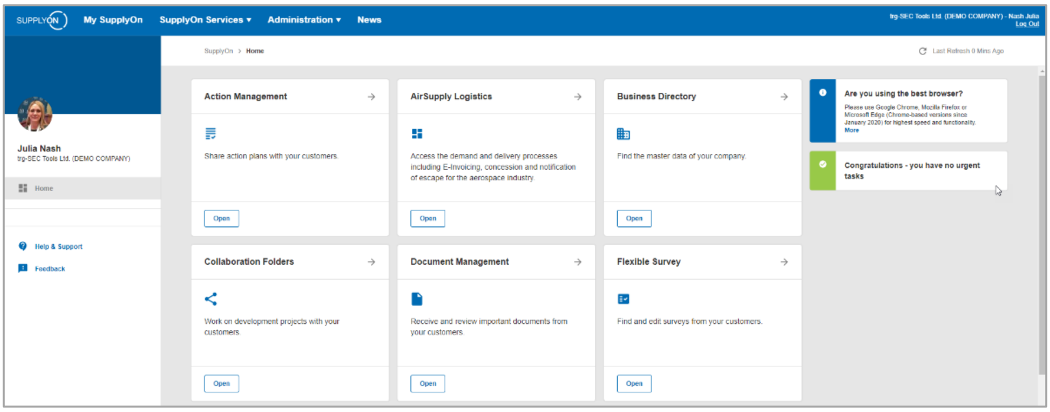

Figure: **Home screen** with **dashboard** and **tiles related** to user roles plus **notifications**

2.1 How to change my user account

We advise you to check your own account settings first and change them if necessary before creating new users.

This way you will know immediately what to look for when creating new user accounts.

2. Move the mouse over **Administration**
3. Select the entry **My User Account**

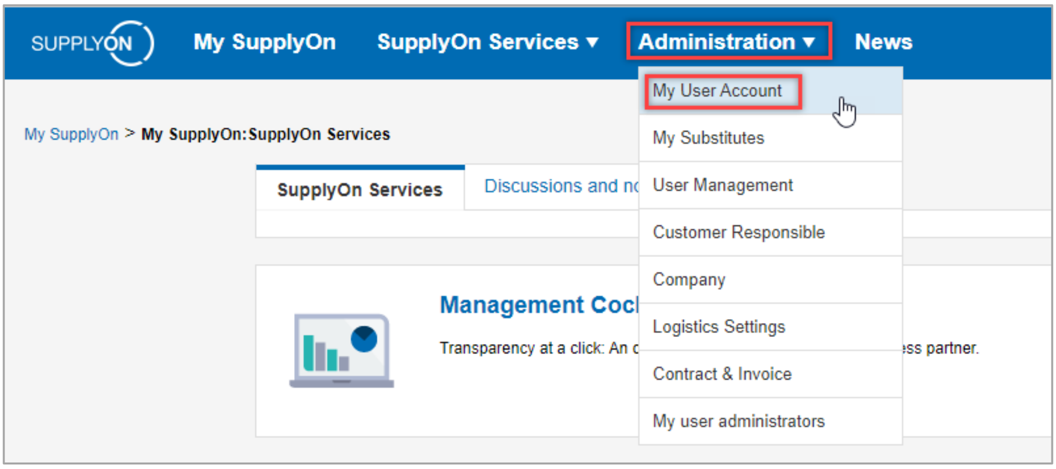

Figure: **Administration with drop down menu entries for Company Administrators**

Your user master details are displayed

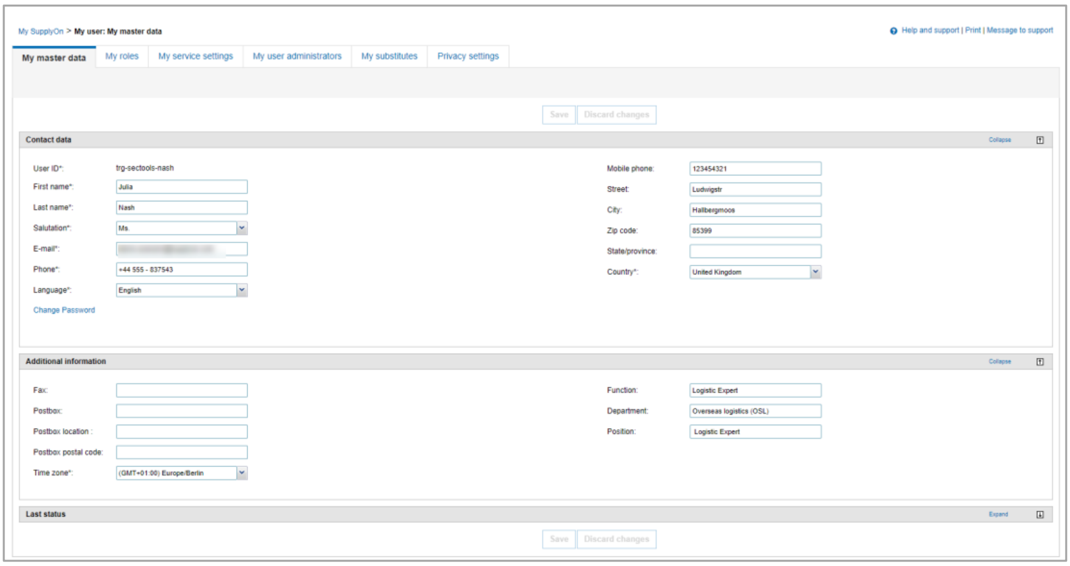

Figure: **My user: My master details**

You have the possibility to choose a language for yourself from 16 different ones.

4. Click the **drop-down menu** next to Language to select the most convenient language

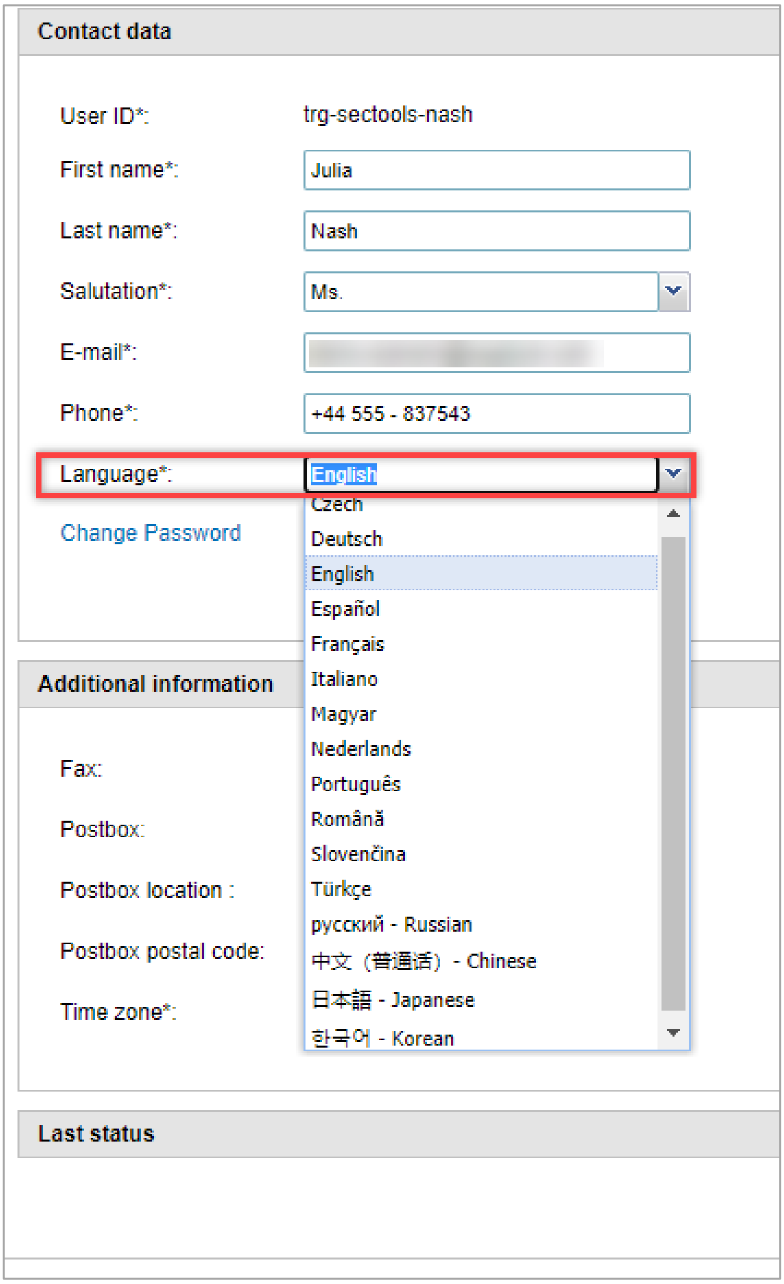

Figure: **My user: My master details with drop-down selection of languages**

We also recommend that you select the time zone in which you live. This entry is relevant in order to show status information and time stamps in your time zone.

5. Ensure to **Save** your entries.

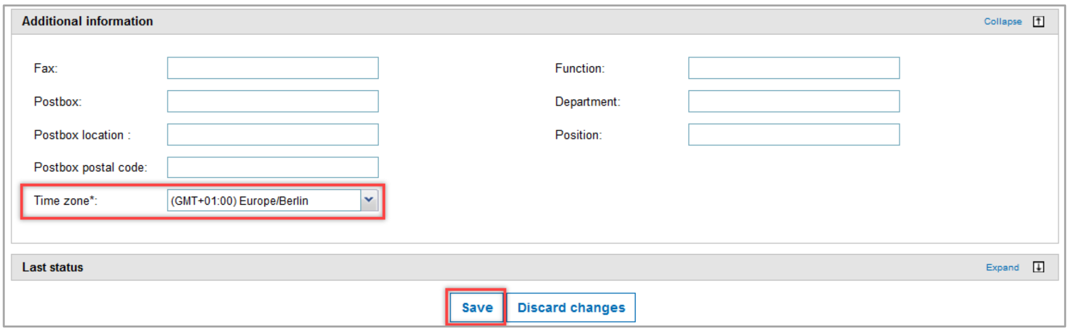

Figure: **My user: My master details with drop-down for time zones**

3 How to create a new user and assign the area(s) of responsibility

To enable all your colleagues to work with the SupplyOn applications, you create users and define the associated roles, their so-called area of responsibility.

For a quick guide, we offer to watch the video on how to create a user in the Media Library. Start the video **Standard user administration**.

After logging in to SupplyOn you are on the SupplyOn Home page with the tiles of the Dashboard and latest notifications.

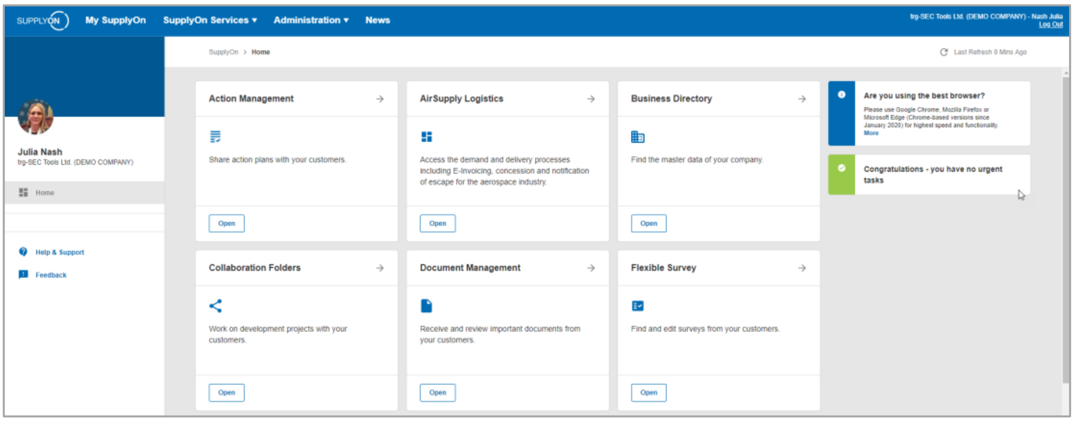

Figure: **Home screen** with **Dashboard** and **tiles** related to user roles plus **notifications**

1. Move the mouse over **Administration**
2. Select the entry **User Management**

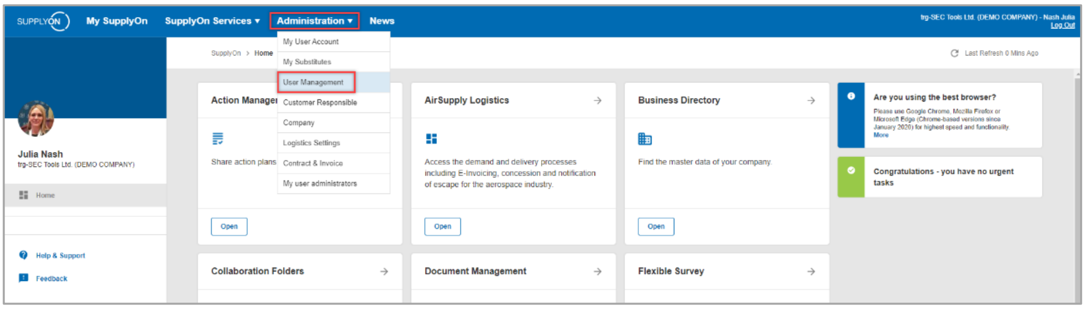

Figure: **Home screen with Administration drop-down menu**

3. Click **+ Create user**

In this example you see already created users. In your case the list is empty.

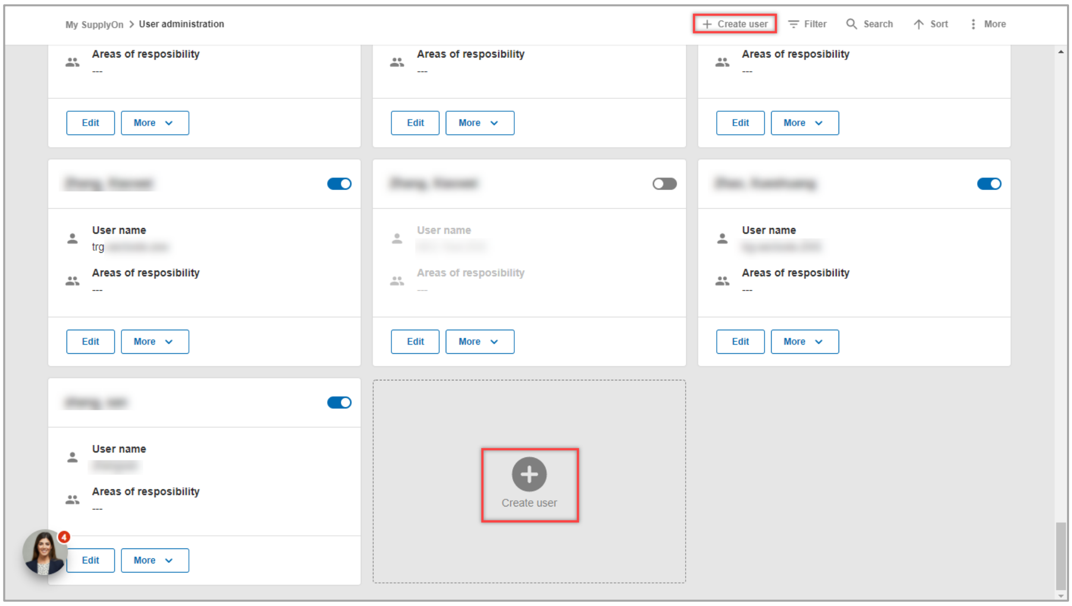

Figure: **My SupplyOn User Administration** with overview of already created users

Mandatory fields are marked with *.

4. Fill all mandatory fields
5. Scroll down

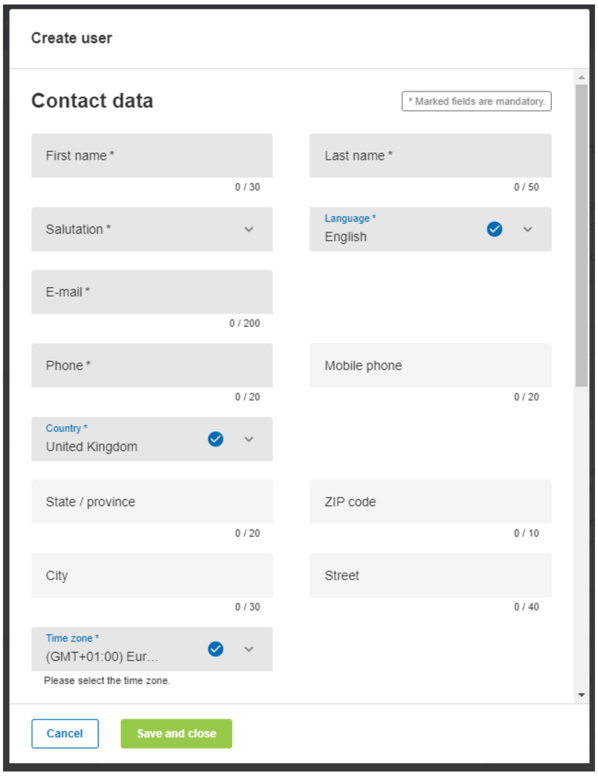

Figure: **Create user** screen with first part of mandatory fields

Once you click into the Password field, the password rules will be displayed to help you defining a password.

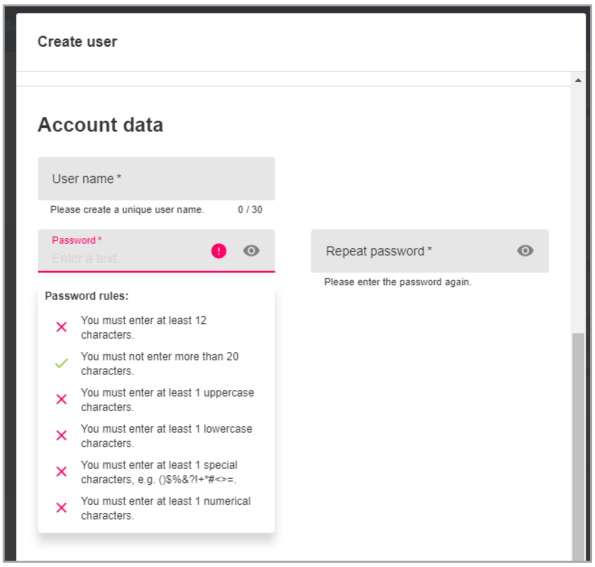

Figure: **Create user** screen with second part of mandatory fields **and password rules**

6. Continue with the mandatory fields
7. Define the **area(s) of responsibility**.

Depending on the task the person has to take over, set the tick in front of the corresponding area. Below selected relevant tasks as well as the respective area of responsibility are listed:

- ✓ To assign a second Company Administrator - set the tick at the Company Administration
- ✓ To work with orders and for the invoice creation – set the tick at the Order Fulfillment, Finance Processes.
- ✓ To retrieve provided customer documents – set the tick at Sales.
- ✓ To create Advanced Shipping Notices (ASN) – set the tick at the Shipping, Goods received, Warehouse Management
- ✓ To set up and edit master data for logistics – set the tick at Supply Chain Administration

8. For this example, select Order Fulfillment, Finance…
9. For more details per area click **More Information**
10. Confirm your entries with a click on **Save and Close**

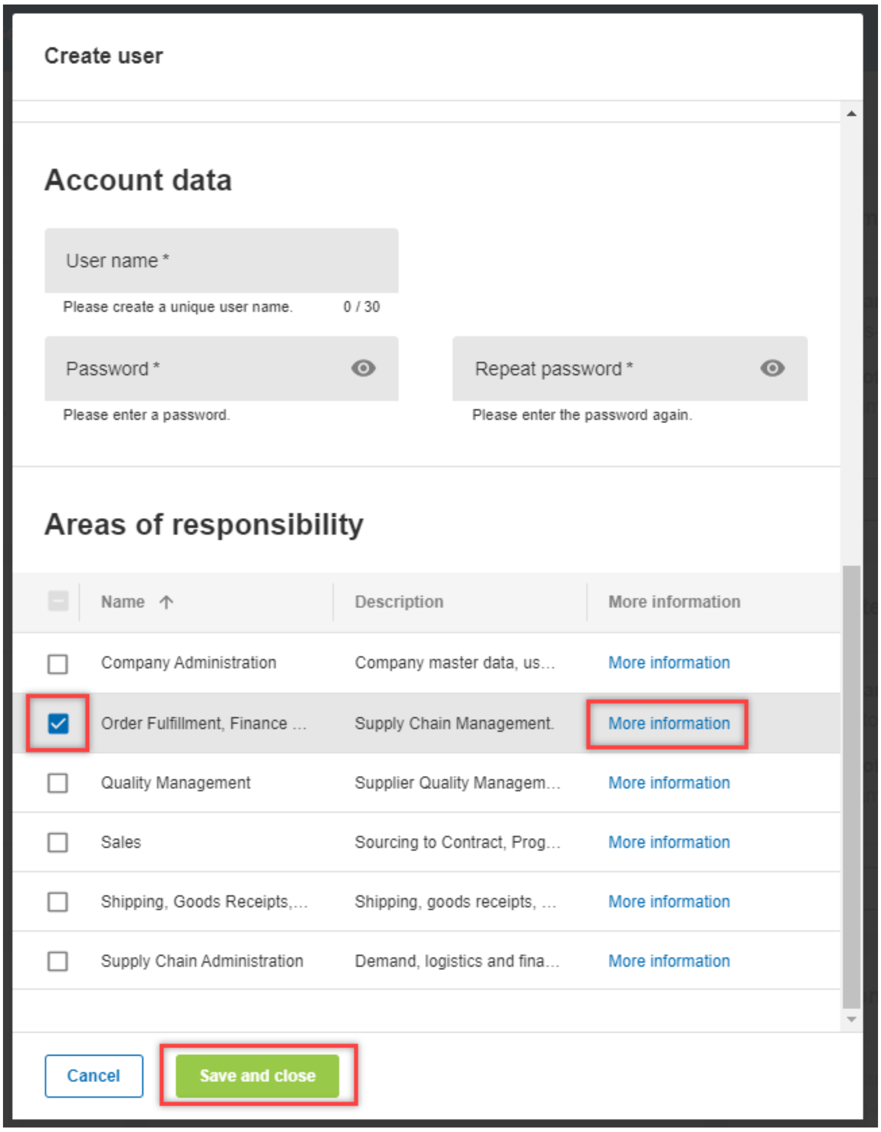

Figure: **Create user** screen with second part of mandatory fields **and area(s) of responsibility**

3.1 How to copy a user

Assuming you have created a user and you need to add the next user from the same department and with the same areas of responsibility, there is a quick way to copy users.

11. Choose the user you want to copy, and open the **drop-down menu** next to **More**
12. Click **Copy**
13. Change the contact details and **Save** your new user

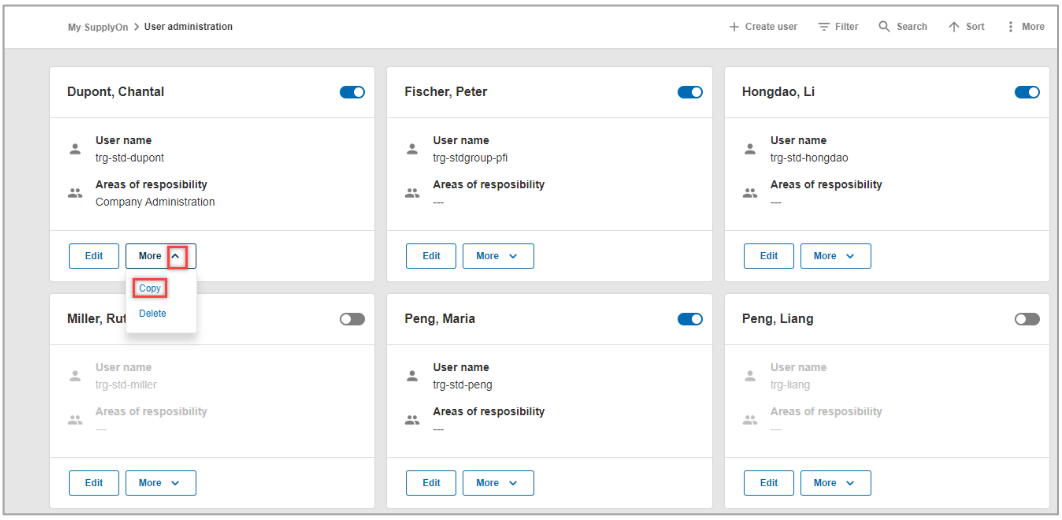

Figure: **My SupplyOn User administration** with **drop-down menu** for **More** within a created user

4 How to work in the advanced mode

The SupplyOn application helps you to create users quickly and easily as explained in the previous chapter. However, you may need to make settings that are not available in Standard Mode, for example change a user ID, unlock a user or manage roles per different location. To do this, open the Advanced user administration.

For a quick guide, we offer to watch the video on how to work in the advanced mode in the [Media Library](). Start the video **Standard user administration for advanced users**.

Within the User Administration,

1. click the three dots next to **More**
2. and select Advanced user administration

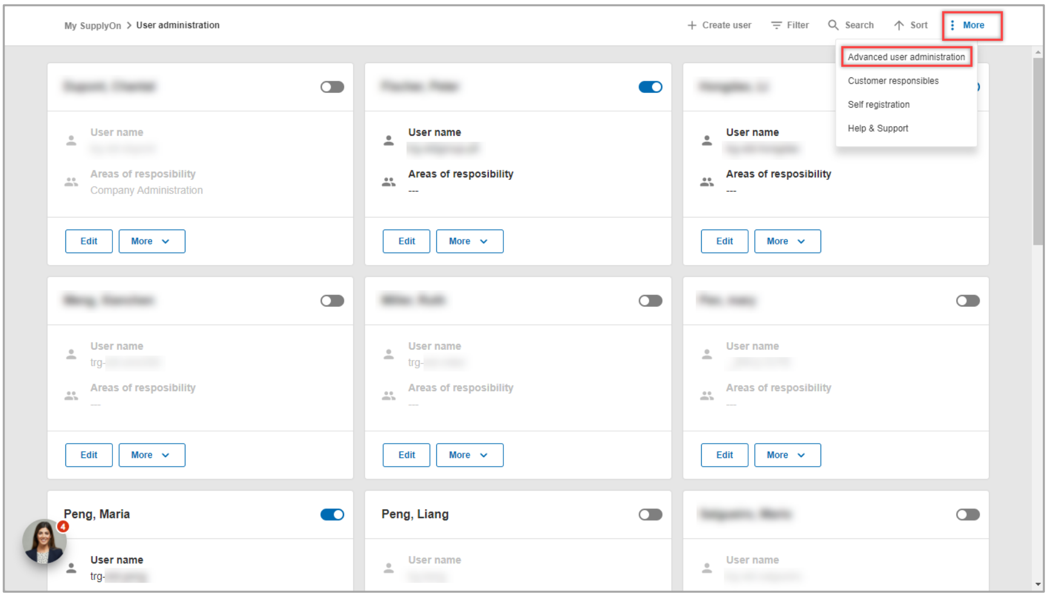

Figure: **My SupplyOn User administration** with **extended menu** within **More**

3. Click the tab **User accounts**

All already created users are displayed. You can make changes by using the buttons on the bottom, or open the drop-down menu next to a user.

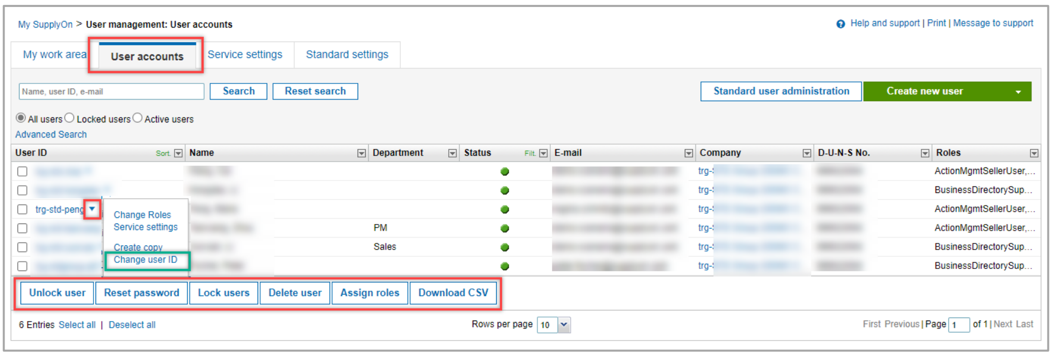

Figure: **My SupplyOn User management. User accounts** overview with action menu within an account

Note: in case a user wants you to change the user ID (username), use this path to change it by selecting Change user ID.

4.1 How to assign roles to different locations within your company

In case your company is structured in a holding as described here, you have to use the advanced mode to define the roles related to each location.

The advanced mode is opened.

4. Click the relevant **User ID**

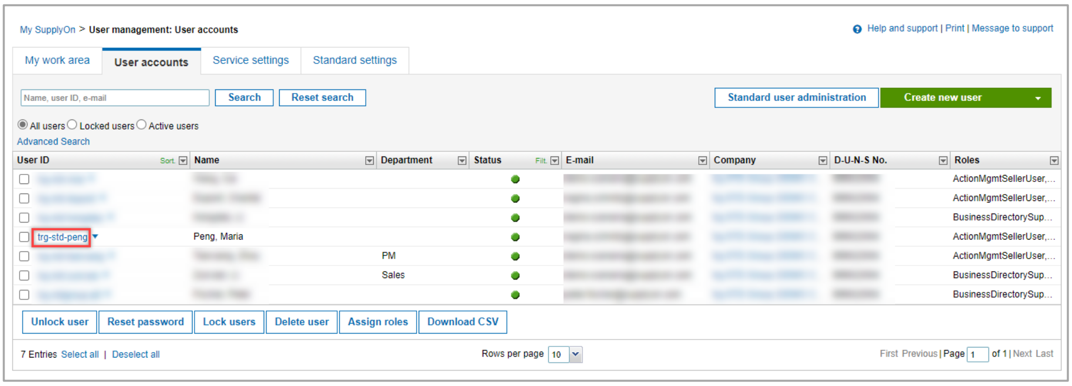

Figure: **My SupplyOn User management. User accounts** overview with action menu within an account

5. Open the tab **My areas of Responsibility**

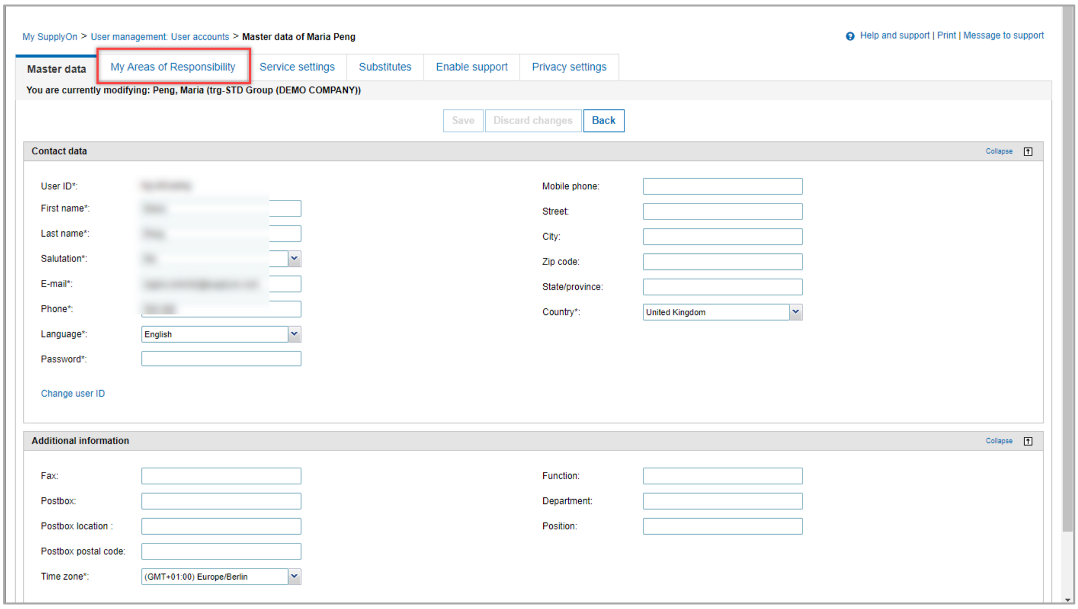

Figure: **My SupplyOn User management. User accounts** with master data of the used account

All available roles are grouped into areas of responsibilities.

6. Open one group with a click on **Expand**

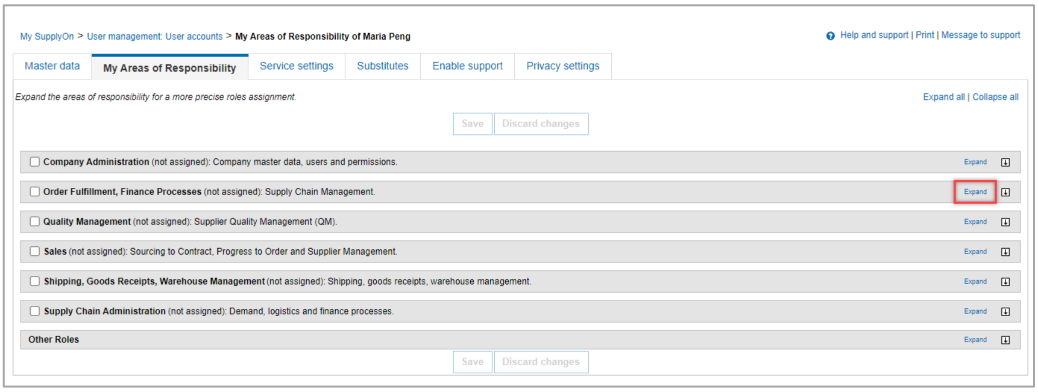

Figure: **My SupplyOn User management. With the overview of grouped roles**

For suppliers who are working with SupplyOn already, the screen looks slightly different. You can decide if you want to see the roles grouped by responsibility or not.

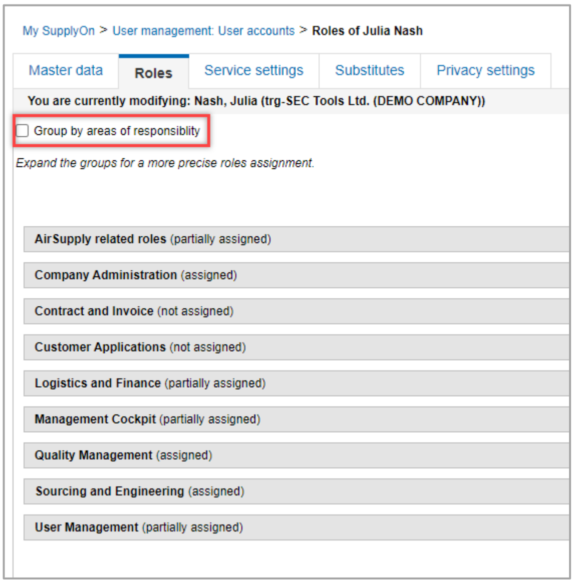

*Figure: **My SupplyOn User management. With the overview of roles /** a different supplier is used for this*

To assign a role to multiple locations at once, open an area of responsibility which is required

7. By clicking **Expand**
8. select the required role by checking the box in front of the role
9. click **Show Companies** and select all relevant companies (i.e. Legal Entities).

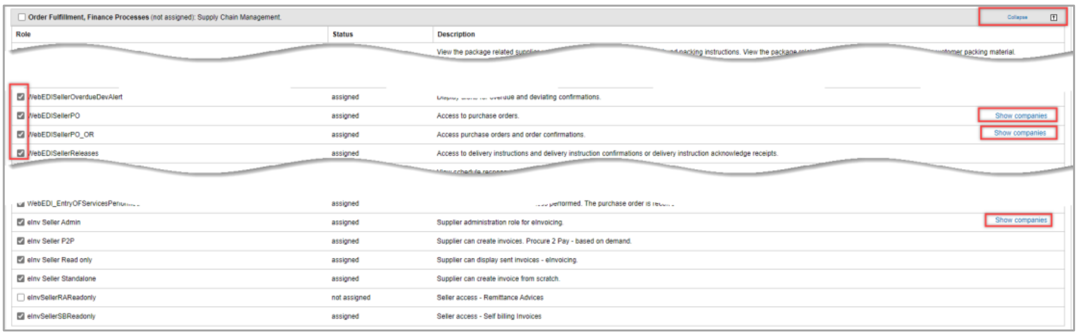

Figure: **My SupplyOn User management. User accounts** overview with action menu within an account

Note: This ensures that the user can work with one account (SSO) for all different locations.

10. **Save** your settings.

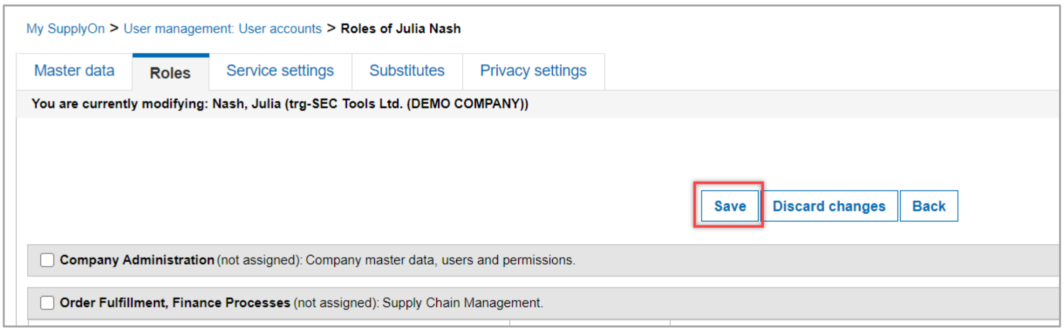

Figure: **My SupplyOn User management. User accounts** with **Save** button

5 Brief introduction to the corporate structure in SupplyOn

During the registration process your customer defined your company structure based on your available master data. The number of organization entities as described below may vary by supplier.

Each Company is structured into:

- Holding – Corporate Group (CG)
    - Country subsidiary – Legal Entity (LE)
        - Location(s) within one country – Control Point (CP)

Networklink(s) ensures that messages (e.g. demands, order changes) are sent from the customer CP(s) to the correct supplier CP(s) – and vice versa for ASNs, invoices etc.

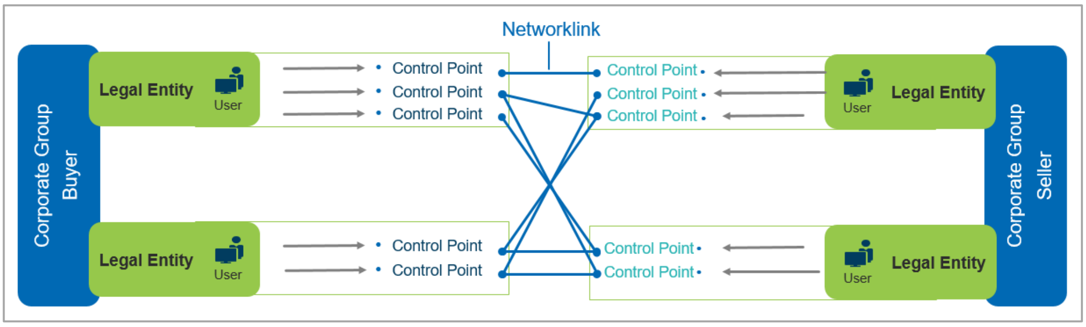

Figure: SupplyOn internal overview of Company Structure with NWL

6 How to set master data once in the Logistics settings

Depending on the processes you use within your company, you are able to set up different master data as a company administrator. In this chapter, the two entries which are relevant and useful within the digital P2P process are described.

To define the automatic creation of ASN number and package labels, which will facilitate the daily work with ASNs for your colleagues, please follow these steps:

Login to SupplyOn

1. Open the **Administration** menu
2. and select the entry **Logistics settings**

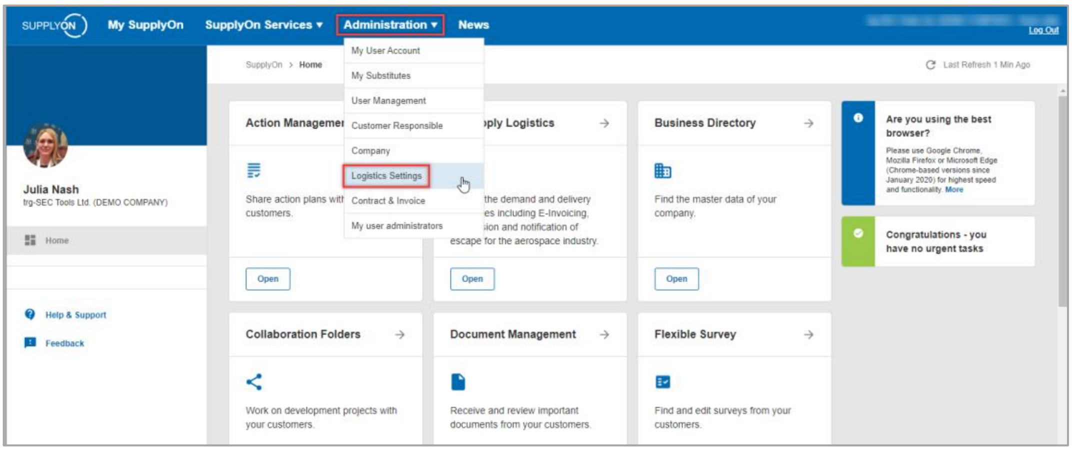

Figure: **My SupplyOn Administration with drop-down menu**

The company structure as explained [here](#) is displayed. If you have several legal entities within your holding, first select the country by

3. clicking the Control Point **icon** of the LE (Legal Entity)

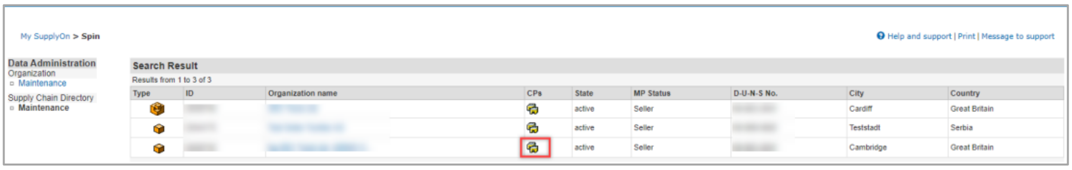

Figure: **Spin** with Company structure for Corporate Group and Legal Entities

4. Now select the **Control Point** you want to create the master data entry for

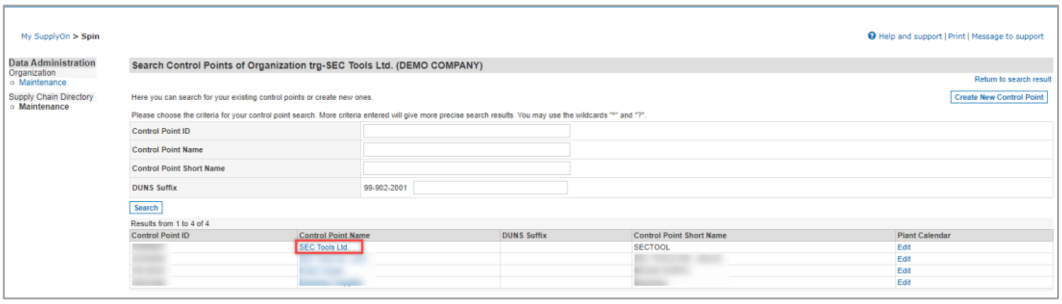

Figure: **Spin** within one Legal Entity and list of **Control Points**

5. Click **Change Details** and scroll down

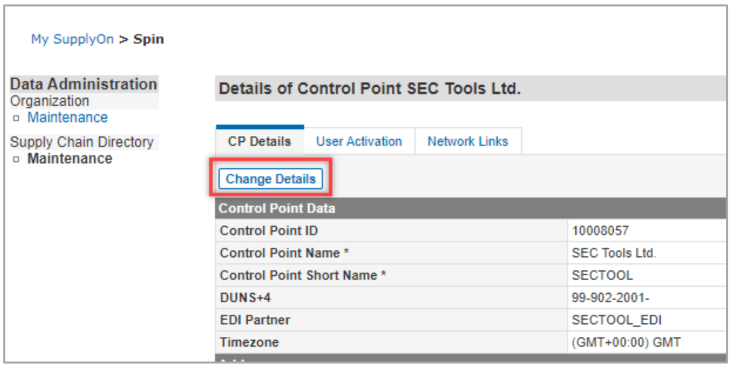

Figure: **Spin** within **Details** of selected **Control Point**

6. In the **Further Logistics Data** area, check the appropriate boxes and enter a start number of your choice.
7. **Save** your entries

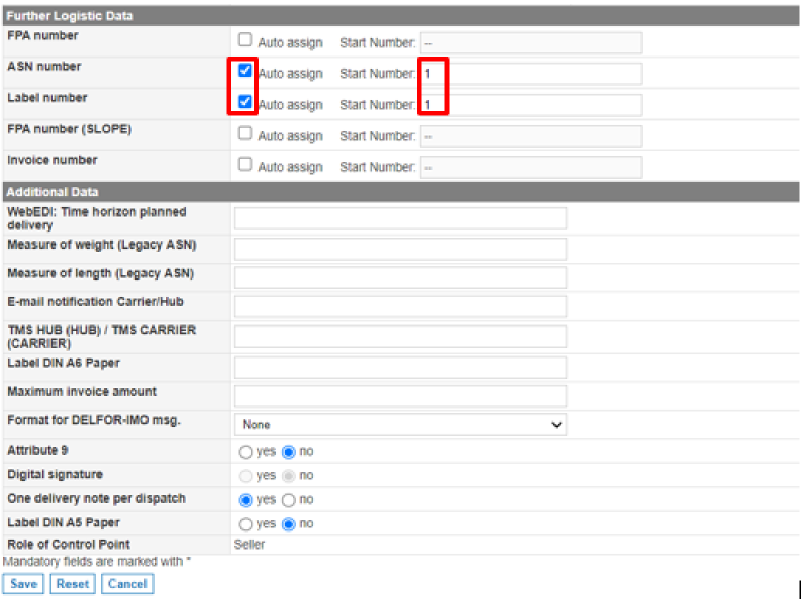

Figure: **Spin** within **Details for Further Logistic Data** of selected **Control Point**

7 How to apply e-mail notifications to your needs

Do your colleagues receive an email for every logistics message? The settings can be changed per control point and user as follows:

Open the Details of a Control Point as described here.

1. Open the tab **User Activation**
2. and click **Change Details**

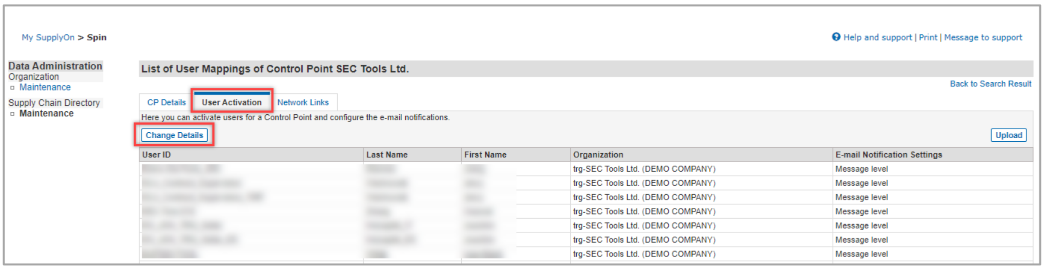

Figure: **Spin** within **List of User Mappings** of selected **Control Point**

3. Open the **drop-down menu** for the relevant user within the **Message Level**
4. Select the user and message level required and save your changes

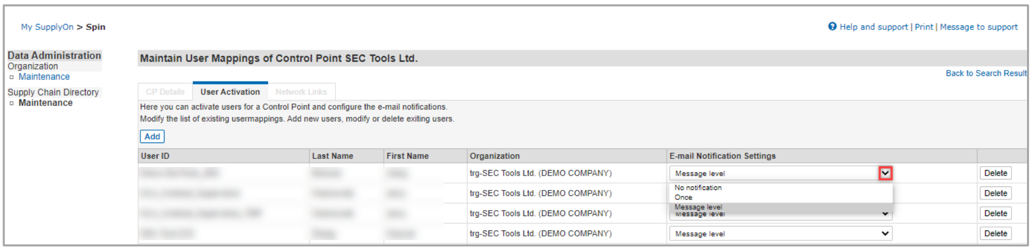

Figure: **Spin** within **List of User Mappings** of selected **Control Point**

- ✓ No notification - Although new messages arrive, the respective user will not receive an e-mail notification
- ✓ One-time notification **-** The respective user will be informed once by e-mail about the first new incoming message. He/She will not receive any more e-mails for further messages until they have accessed SupplyOn.
- ✓ Notification at message level - As soon as a new message is received, the respective user will be informed by e-mail.

8 Roles and Rights

This chapter shows which roles you need as a company administrator. In case you use SupplyOn the first time you may have all related roles already.

In case you need to take over the task you find a list of relevant roles you need.

- ✓ Company Admin – Create and maintain users, manage company data in Business Directory
- ✓ Control Point Admin – needed master data entry on CP level as described here
- ✓ CorporateGroupMasterDataAdmin –Create user groups

Company Administration (assigned) Collapse

Role	Status	Description	
CompanyAdmin	assigned	Manage company data. For suppliers, the authorizations of the roles "BusinessDirectorySupplierStandard" and "SLMSupplierAll" are included.	Show companies
ControlPointAdmin	assigned	Creation and administration of sites in the Supply Chain Directory. Article data administration.	Show companies
CorporateGroupMasterDataAdmin	assigned	Master data administration for companies within a group.	

Figure: My user with overview of my roles within the area of **Company Administration**

- ✓ UMAdmin – Create and maintain users
- ✓ UMCompanyConfig – needed for company-wide user administration as described here
- ✓ UMEditUserProfiles – needed to change user master data and substitutes
- ✓ UMTeamAdmin – needed in case you want to define user groups

User Management (partially assigned) Collapse

Role	Status	Description	
UMAdmin	assigned	All functions of user administration (create, change, activate, deactivate users, assign roles and reset password).	Show companies
UMAdminBasic	not assigned	Change user master data. Activate or deactivate users and reset password.	
UMAdminRole	not assigned	Assign roles to users. Creating, activating and deactivating users is not included.	
UMAdminUser	not assigned	Administrating users. Creating, activating or deactivating users and reset password. Assigning of roles is not included.	
UMCompanyConfig	assigned	Authorization for company-wide user administration basic settings.	Show companies
UMDefault	assigned	Permits processing of a user's own user profile.	
UMEditUserProfiles	assigned	Change user master data and substitutes.	Show companies
UMResetPassword	not assigned	Reset passwords.	
UMTeamAdmin	assigned	Administration of user groups.	Show companies
UMUserUpload	not assigned	Creation and updating of users by upload of user profiles.	
UMViewUserProfiles	not assigned	View user data.	

Figure: My user with overview of my roles within the area of **User Management**